

The Timken Company Charitable and Educational Fund, Inc.



Matching Gift Program Guidelines

To encourage and support the generosity and community involvement of Timken employees, The Timken Company Charitable and Educational Fund, Inc. ("The Timken Fund") Matching Gift Program provides matching funds to approved charitable organizations that associates personally support. This program allows the company to broaden its support for charitable organizations while giving associates the opportunity to increase the impact of their contribution.

Who Can Participate

- **All active U.S. employees and directors of The Timken Company and its wholly-owned U.S. subsidiaries.**
- **Ineligible Donors:** Retired employees, contingent workers and relatives of employees.

Contribution Limits

- The Timken Fund Matching Gift Program has a quarterly cap determined annually by The Timken Fund Board of Trustees.
- The individual minimum association donation is \$50.
- The individual associate cap is \$500 per year.

Gift Eligibility Rules

- Minimum donation to be matched per charitable organization is \$50 with an aggregate maximum gift match of \$500 per associate per year. The Timken Fund may further cap the match to any particular charitable organization based on the total number of matching gift and grant requests for that organization.
- Only the tax-deductible portion of the employee donation will be matched.
- Gifts may be made via cash, check, credit card or stock (with an established market value determined by the average price on the day the gift is made).
- Gifts must be personal contributions actually made, not pledged.
- Gifts must be made by an individual. Gifts made collectively by a group are not eligible.
- Tuition and dues to educational institutions, even if such institutions are otherwise approved, are not eligible.

Eligible Recipient Organizations

- Eligible recipient organizations for this Program are those on the list located on the matching gift site at www.Timken.com/matchinggifts. (Note: United Way contributions are subject to a separate type of match and are excluded from this Program.)
- Other 501(c)(3) nonprofit organizations may be approved to become eligible recipient organizations for this Program. Associates should complete the form located on the matching gift site to ask for their organization to be reviewed for approval.

Ineligible Recipient Organizations

- Political or religious organizations.
- Any organization not on the approved list of recipient organizations.

How the Program Works

The donor should:

- Complete Part 1 of the Matching Gift Request Form.
- Mail completed form with original signature to the approved recipient organization.
(Faxed or scanned copies will not be accepted.)

The recipient organization should:

- Complete Part 2 of the Matching Gift Request Form.
- The authorized officer of the recipient organization must verify the donation, sign and return the original form, along with a copy of its 501(c)(3) IRS determination letter, to The Timken Matching Gift Program, Mail Code: GNE-30, 1835 Dueber Ave. SW, Canton, OH 44706-0928.

Eligible gifts will be processed quarterly.

Matching gift requests **must be received within 6 months of the gift date**. Requests received after that time will not be matched.

Other General Rules

The Timken Fund reserves the right, in its sole discretion, not to match any particular gift to any organization, and to determine which organizations are eligible recipient organizations for the purposes of this Program. The Timken Fund also reserves the right to limit the amount of money it will contribute to the Matching Gift Program in any calendar year; to amend or terminate this Program at any time and to make such interpretation in the administration of this Program as may be required.

For more information, please contact The Timken Fund Matching Gift Program at matchinggifts@timken.com or 330-471-4068.

**The Timken Company Charitable and Educational Fund, Inc.
Matching Gift Request Form**



Donor:

1. Complete Part 1 of the form.
2. Send this form and a copy of the Matching Gift Program Guidelines to the charitable organization along with your gift.

Recipient Organization:

1. Verify the gift & complete Part 2 of the form.
2. If this is your first time requesting a matching gift with The Timken Company Charitable and Educational Fund, Inc., please enclose a copy of your 501(c)(3) IRS determination letter.
3. Forward to the address below.

Faxed and scanned copies will not be accepted.

Part 1 – Donor Section

Donor Name _____ Timken Location: _____

Home Address _____ City _____ State _____ Zip _____

Phone (____) _____ Email _____

Recipient Organization _____

Type of Gift: Cash Check Credit Card Stock: _____ shares of _____

Exact date of gift _____ Amount of Gift (minimum \$50) _____ Amount to be Matched (max \$500) _____

I certify that neither my family nor I will derive any direct financial or material benefit from this contribution. I authorize the above-named recipient organization to report this gift to The Timken Company Charitable and Educational Fund, Inc. for the purpose of applying for a matching gift. I certify that my gift is a voluntary contribution that fully complies with the provisions of the program described herein and does not represent in any way a fee for services or benefit. Any misrepresentation by me in the statements made herein will render this gift ineligible for any matching contributions and, in addition, may result in violations of the law. In addition, I certify that I have not been nor will be reimbursed by anyone for this contribution. I have read and understood the guidelines of The Timken Company Charitable and Educational Fund, Inc. Matching Gift Program.

Donor Signature _____ Date _____

Part 2 – Recipient Organization Section

Organization Name _____ EIN _____

Street Address _____ City _____ State _____ Zip _____

Phone(____) _____ Fax(____) _____ Email _____

Web Address _____

Date Gift Received _____ Amount of Gift _____ Tax-deductible Amount _____

I certify that I have read and understood the guidelines of The Timken Company Charitable and Educational Fund, Inc. Matching Gift Program. This organization meets the eligibility requirements of the Program. The contributions will not be used for political, religious or other ineligible purposes set forth in the guidelines. The contributor will derive no personal material benefit from this gift or match. This organization is a tax-exempt public charity. This organization is in full compliance with the anti-terrorism laws under the USA Patriot Act. In addition, by counter-signing this Matching Gift Request Form, I agree that this organization will not promote or engage in violence, terrorism, bigotry or the destruction of any state, nor will it make sub-grants to any entity that engages in these activities. I am authorized to attest to the above statements and have sufficient knowledge to do so.

Authorized Officer's Name (Please Print) _____ Title _____

Signature _____ Date _____

Mail completed form to: The Timken Fund Matching Gift Program, Mail Code: GNE-30, 1835 Dueber Ave SW, Canton, OH 44706-0928
Questions: call 330-471-4068 or email matchinggifts@timken.com